



## EXPLANATION OF PROCESS STEPS:

### **1. Conduct market research.**

Ordering activities should utilize GSA *Advantage!*® and GSA eLibrary to identify small businesses capable of meeting the requirement. Through *Advantage!*®, ordering activities can find all contractors who provide the supply/product required and view the socioeconomic status of each contractor. Through eLibrary, ordering activities can find all contractors under the Special Item Number (SIN) associated with the required supply or service; ordering activities can then go one step further and filter the list of contractors by any specific socioeconomic category desired.

If a search on *Advantage!*® and eLibrary does not result in any possible small business sources, ordering activities may also consider issuing a Request for Information (RFI) on eBuy to determine the capabilities of small businesses in the relevant SINs and to identify small businesses capable of doing the work.

After conducting market research, ordering activities should be able to answer the question, “Is a small business capable of doing the work?”

### **2. A small business is capable of doing the work in its entirety.**

If the ordering activity has determined that a small business can meet the whole requirement alone, it has two options:

In the acquisition of supplies or services not requiring a statement of work, ordering activities simply have to review the catalog or pricelist (available on *Advantage!*® and eLibrary) of at least 3 Schedule contractors who are small businesses and place an order with the Schedule contractor that represents the best value.

In the acquisition of services requiring a statement of work, ordering activities can designate socioeconomic status as a primary evaluation factor in the Request for Quote (RFQ). This RFQ can then be emailed to 3 (or more) Schedule contractors. In this instance, the RFQ can be sent to only small businesses if an ordering activity so chooses. Note that ordering activities must provide a copy of the RFQ to any Schedule contractor that requests a copy. For additional guidance on how to use socioeconomic status as an evaluation factor, see the sample RFQ language posted on [www.gsa.gov/schedulesandsbgoals](http://www.gsa.gov/schedulesandsbgoals).

### **3. A small business is capable of only doing part of the work on its own.**

If market research reveals that there is no small business that can meet the requirement as a whole *but* there are small businesses that can each cover portions of the entire requirement, ordering activities can designate socioeconomic status as a primary evaluation factor and also encourage contractor teaming arrangements (CTAs) in the RFQ. The RFQ can then be posted on eBuy which will result in *all* Schedule contractors awarded the relevant SIN(s) to be able to view the document. While posting on eBuy will result in the RFQ being viewable by large businesses awarded the relevant SIN(s), designation of socioeconomic status as an evaluation factor and the CTA language in the RFQ will prompt them to find a small business (or

businesses) to partner with in responding to the requirement. Posting on eBuy will also ensure that a sufficient number of small businesses (i.e. *all* those awarded the relevant SIN(s)) have access to the RFQ so that there is a greater probability of receiving responses from CTAs made up solely between small businesses. For sample RFQ language on evaluating CTAs for the socioeconomic status factor, view the presentation titled “GSA Schedules and the Utilization of Small Business” on [www.gsa.gov/schedulesandsbgoals](http://www.gsa.gov/schedulesandsbgoals).

#### **4. A small business is not capable of doing any part of the work.**

If market research reveals that the requirement can only be met by an other than small business, ordering activities can still utilize small business by designating subcontracting to small businesses as a primary evaluation factor. Ordering activities can then post the RFQ to eBuy.

#### **5. Evaluate the quotes.**

In any situation, quotes must always be evaluated in accordance with the evaluation factors listed in the RFQ.

#### **6. Report in CPARS contracting performance.**

Recent rulings require ordering activities to report past performance and other responsibility-related determinations into the Contractor Performance Assessment Reporting System (CPARS).

Regardless of whether the BPA/task order was placed with a small business, a CTA, or an other than small business, ordering activities need to report past performance for the contractor in CPARS. Positive past performance will assist the small businesses with being awarded BPAs/orders in the future.